

CELINE WYNN: Hello, everyone. This is Celine Wynn with the e-planning support team. In this video, I'm going to show you how to add folders, documents, and templates to your projects in D2. First, you will want to locate your project, either in your favorites widget or the cabinets in the repository browser widget.

Click on the NEPA number. Notice that the default project folders are shown in the document list widget. To add a folder to the default structure, for example, if you want to create separate folders for separate team members, click on New on the black D2 menu bar, and select Folder.

You'll be prompted to choose a type of folder. Do not change the type and click OK. This is where you will name your folder. Enter this in the required name field, then hit OK. You will now see the new folder placed alphabetically in the document list widget. To add documents to a project, you can either drag and drop files from your computer into a project folder or you can use the Import button on the black menu bar .

I'll show you how to do both. First open the folder you want to add the document to by double clicking on it in the document list widget. Then locate the computer file you want to add to D2. Make sure you can see both windows, then simply click and hold on the computer file and drag it into the document list window.

The import file window will pop up. Hit Next. Select a creation profile by using the drop down arrow to the right of that field. Choose Import EPL document. Now choose the EPL file type. EPL MSW document for Microsoft Word documents, or just document for all other file types. Hit Next.

You can change the document name and add other document properties here if you wish. If not, hit Next. The file uploaded will appear, then the document will be added to the D2 folder, and appear in the document list widget. Use the breadcrumbs to get back to your main folder structure.

Using the import button, follow similar steps. First, open the folder you want to add the document to by double clicking on it in the document list widget. Locate the black menu bar in D2. Then click on Import and file. The import file window will pop up.

To choose a file, you can double click in the files to import field or you can click on the ellipses to the right of that field. Your file browser will open. Select the file you want to add, and the selected file format field will auto populate after you click Open.

Hit Next. Then follow the same steps I showed you for the drag and drop method. Now you know both ways to add documents to projects in D2. Again, use the breadcrumbs to get back to your main folder structure.

To add a document template to a project, you must first look at the template you need in the repository browser widget. These templates can be found under asset library and that document templates folder. Expand the standard word templates folder.

Double click the folder which contains the type of template you need. The templates will appear in the document list widget. Right click on the template you need, and select Copy. Now locate your project, and the document folder in the document list widget.

Right click on the folder that you want the document template in and then hit Paste. Double click the folder to open it. You'll see that you've successfully copied and pasted a document template to your project. Thank you for watching, and please remember, if you have any questions, submit a remedy ticket, or visit our KRC and SharePoint sites for additional supporting documentation.